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France

Fishery Products

Overview of the French Seafood Market

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Prepared by:

Besa L. Kotati

U.S. Embassy

Drafted by:

Marie-Cécile Hénard

Report Highlights:

France has a structural trade deficit for seafood. The deficit is characterized by a strong consumer demand for seafood combined with limited domestic production which, in turn, resulted in French seafood imports of Euro 3.34 billion in 2001. Outside Europe, the United States is the leading seafood supplier to France. In France, best market prospects for U.S. seafood and products are surimi, lobster, and salmon.

Includes PSD changes: No

Includes Trade Matrix: No

Unscheduled Report

Paris [FR1], FR

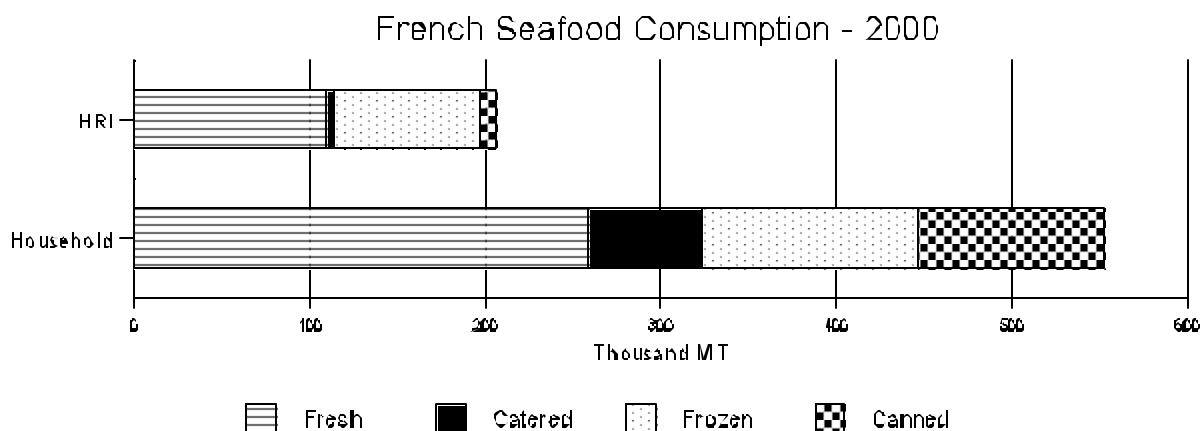
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1. Global Seafood Market

France is a major market for seafood products, because domestic production is significantly lower than consumption. In 2000, France consumed 760,000 MT of seafood (i 8.13 billion), compared to 597,000 MT (i 1.01 billion) of seafood produced. As a result, France imported 842,000 MT (i 3.21 billion) of seafood products, with some reexports.

French wild catch production is limited by the EU Common Fishery Policy. There is some aquaculture in France, but it is expected to remain significantly lower than wild catch. In 2000, aquaculture production was 60,000 MT (i 221.8 million), including mainly rainbow trout, with 41,000 MT produced, valued at i 133.8 million.

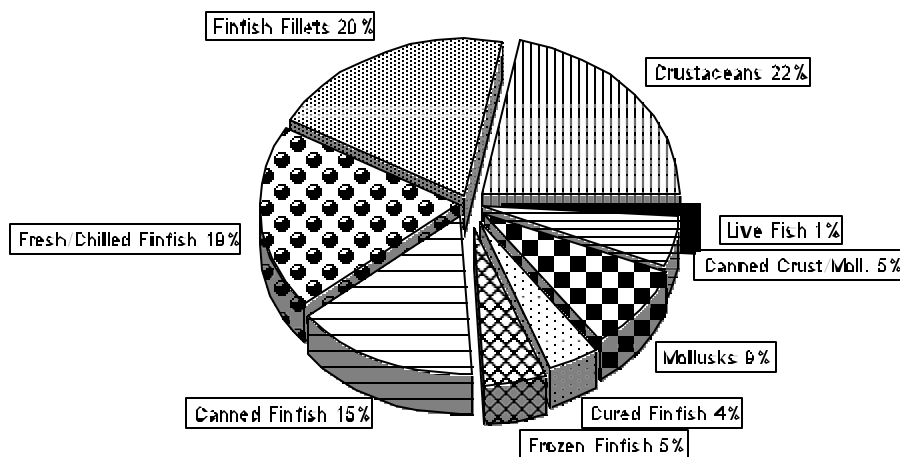
In 2000, French seafood consumption included 73 percent household consumption and 27 percent consumption at hotels, restaurants and institutions (HRI). Approximately half of household and HRI consumption consisted of fresh seafood. Of interest for U.S. products, frozen seafood represented 40 percent of HRI consumption and 22 percent of household consumption, while canned seafood represented almost 20 percent of household consumption. Please see graph below.



2. French Seafood Imports

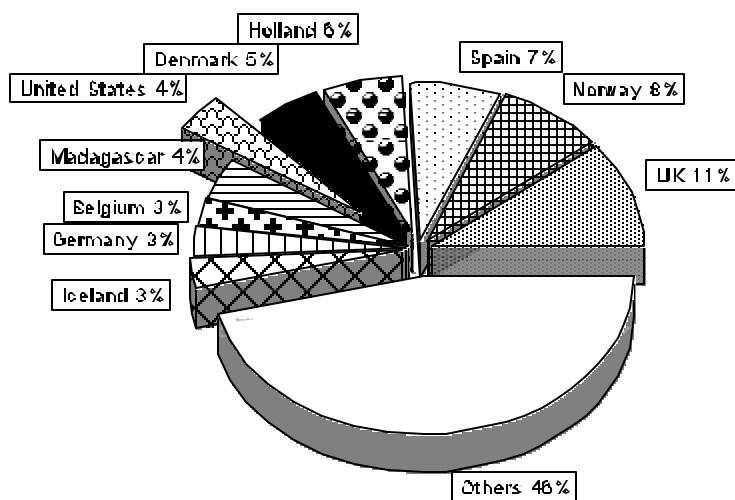
In 2001, French imports of seafood were i 3.34 billion. Imports mainly included crustaceans, frozen fillets, fresh and frozen finfish, as indicated in the graph below.

French Seafood Imports - 2001



France's leading suppliers are traditionally European. However, the United States is France's leading seafood supplier outside of Europe, and ranked sixth in 2001, with 4 percent of total French imports. Please see graph below.

Leading Seafood Suppliers to France - 2001



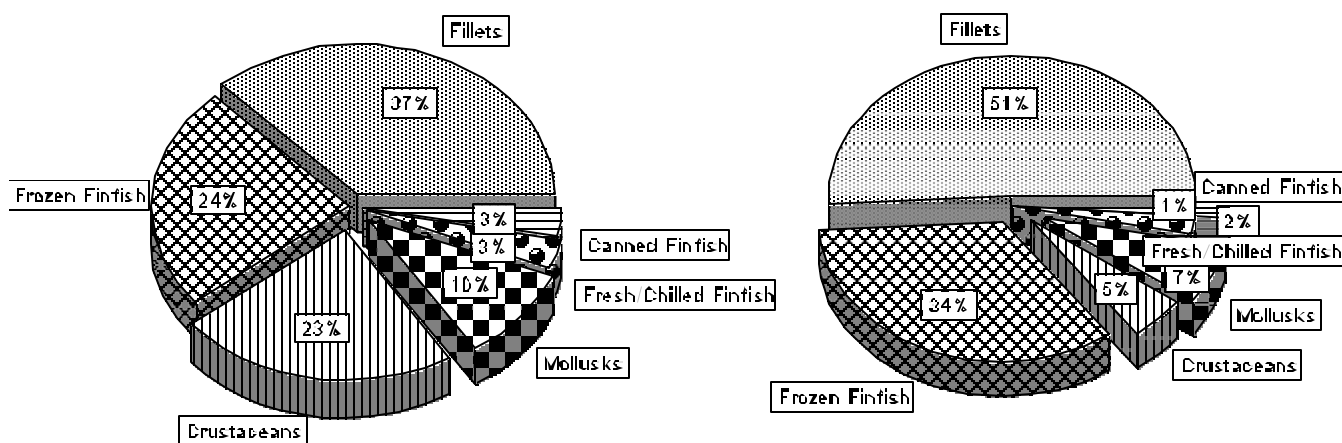
3. French Seafood Imports from the United States

The main seafood categories imported by France from the United States were frozen fillets, frozen finfish, crustaceans and mollusks, as indicated in the graphs below. The share of each seafood category is not the same when one considers quantity or value. The pie charts below indicate that, although large quantities of fillets are exported by the United States to France, their value is below average. By contrast, frozen finfish and especially mollusks appear as products that have higher values than average.

French Seafood Imports from the United States - 2001

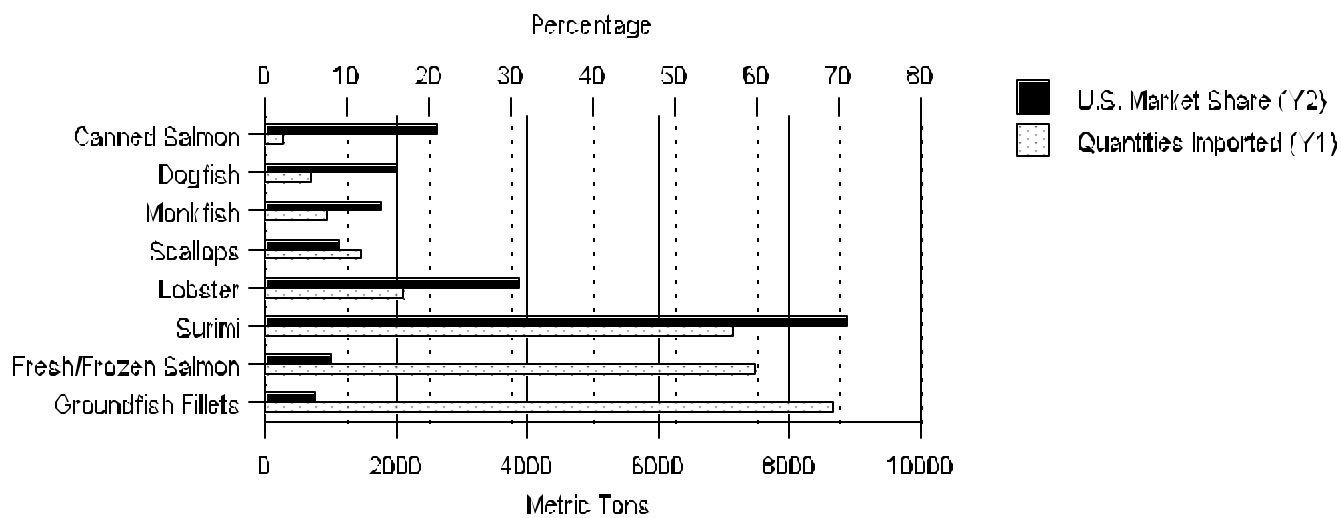
Value: Euro 125.87 million

Quantity: 39,010 MT



The leading seafood products imported by France from the United States are, in quantity, groundfish fillets, fresh and frozen salmon, and surimi. Smaller volumes are recorded for lobster, scallops, monkfish, dogfish, and canned salmon. However, as indicated in the graph below, the largest market shares for U.S. products are for surimi, lobster, and canned salmon.

French Imports of Main Seafood Categories from the United States



The United States leading competitors for seafood on the French market are the following:

- Norway and Scotland for salmon
- Germany, China, Holland, and Denmark for groundfish fillets
- Canada for fresh and frozen lobster
- the United Kingdom, Denmark and Chile for scallops
- Thailand and South Korea for surimi
- the United Kingdom and Canada for dogfish
- the United Kingdom for monkfish